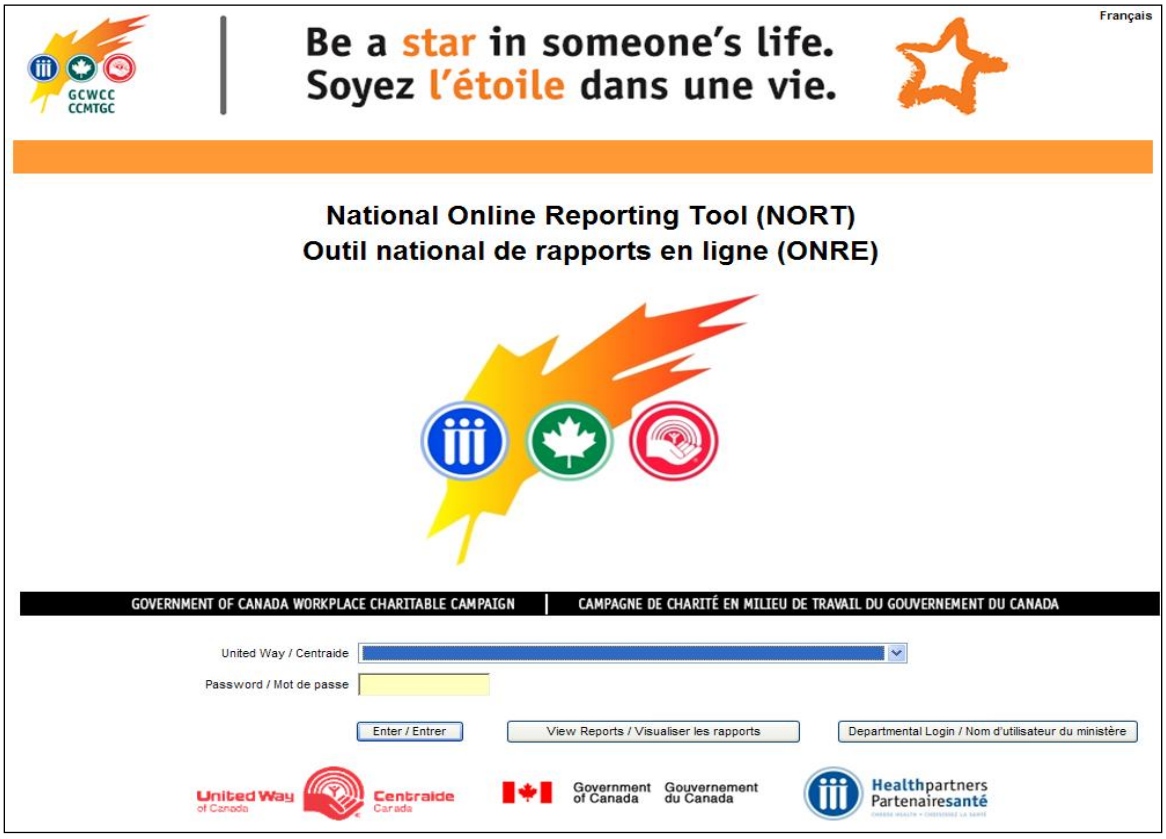
Government of Canada Workplace Charitable Campaign (GCWCC)

National Online Reporting Tool (NORT)

DEPARTMENTAL ADMINISTRATOR GUIDE

Updated: July 2013


Français
GCWCC
CCMTGC
Be a star in someone's life.
Soyez l'étoile dans une vie.
National Online Reporting Tool (NORT)
Outil national de rapports en ligne (ONRE)
GOVERNMENT OF CANADA WORKPLACE CHARITABLE CAMPAIGN
CAMPAGNE DE CHARITÉ EN MILIEU DE TRAVAIL DU GOUVERNEMENT DU CANADA
United Way / Centraide
Password / Mot de passe
Enter / Entrer
View Reports / Visualiser les rapports
Departmental Login / Nom d'utilisateur du ministère
United Way of Canada
Centraide Canada
Government of Canada
Gouvernement du Canada
Healthpartners
Partenairesanté

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Welcome to the National Results Reporting Pilot

United Way Ottawa (UWO) is the Campaign Manager for the Government of Canada Workplace Charitable Campaign (GCWCC), as mandated by Treasury Board, and is looking for ways to advance the national aspect of the campaign.

The national aspect of the GCWCC provides departments and agencies and their staff the opportunity to recognize and celebrate their commitment to community across the country.

Comprehensive national campaign results have, up to now, only been readily available from local United Ways, well after the annual GCWCC closes in the NCR. However, interest in the national picture from a departmental perspective is growing.

To build on this momentum, UWO launched a pilot project in 2011 to collect national, live, verbal campaign results from a small group of departments and report these as a snapshot of national progress at the Deputy Ministers' weekly breakfast meetings with the Clerk of the Privy Council in the fall.

Given the success of the 2011 pilot, UWO has continued the pilot project.

UWO will give each participating department/agency access to an on-line automated system, the National Online Reporting Tool (NORT), to track verbal results at the local level and produce updates nationally during the campaign.

The major tasks for each department/agency participating in the pilot will be to:

- Identify the local campaign volunteers within that department/agency's regional, district and other offices across Canada;
- Enlist their support to change from the current means they use locally to record and report verbal results collected during the campaign; and
- Open user accounts for them in the new automated reporting system, NORT.

During the fall campaign, participating volunteers will be asked to report on five items (number of employees; campaign goal (if available); number of donors; special event and donation dollars raised) and to update the data weekly from September to December. Participating departments/agencies will be able to use the system to monitor their campaign progress across the country and brief their Deputies accordingly. Local United Ways will also have access to the system to collect the data they require for verbal results reporting from the departments and agencies participating in the pilot project.

All other existing operational requirements and procedures at the local level will remain the same. Local volunteers will maintain their relationship with their local United Ways and gift forms and donations will continue to flow between them as they do now and there will be no change to final campaign results reporting.

Note: Departmental Administrators will not be asked to enter NCR verbal results in NORT. These will continue to be captured under the existing systems utilized in the NCR.

Welcome to NORT!

This Guide for the GCWCC National Online Reporting Tool (NORT) has been prepared to serve as a reference tool for Departmental Administrators participating in the pilot project on national campaign results reporting. It will help you learn how to use NORT, including how to:

(1) give NORT access to the local campaign volunteers within your department's regional/district/ local offices across Canada, and

(2) collect updated verbal results from them.

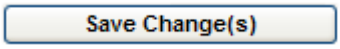
For this pilot project, **during the campaign**, Departmental Administrators participating in the pilot will collect verbal results from their local departmental volunteers across Canada (outside the NCR) on a **weekly basis** through NORT. This information will enable these departments to see a snapshot of their GCWCC campaign outside of the NCR, and reinforce the national aspect of the campaign.

The national totals from outside the NCR for departments/agencies participating in the pilot project will be reviewed at the Deputy Minister weekly breakfast meetings with the Clerk of the Privy Council during the campaign, along with the NCR results. This will give Deputy Ministers an overview of department-wide results for the pilot departments while the campaign is unfolding.

If you have any questions not covered in this manual, or for more information, please contact the GCWCC National Office staff at United Way Ottawa:

Sandy Stiles
Manager, GCWCC, National Approach, United Way Ottawa
Tel: (613) 228-6897 Fax: (613) 228-6722
e-mail: GCWCC_National@unitedwayottawa.ca

Important Points to Remember about NORT:

1. Once all your data-entering is completed remember to click 

at the bottom of the screen! It is **very important** to save any and all information entered or changes made, since if the system is left inactive for any longer than approximately 30 minutes, the application will time-out. A pop-up will notify you of this prior to timing out.

2. Don't forget to LogOff (available at the top right-hand corner of all screens) whenever you are not entering data, or you are away from your computer!

To Access NORT

To access NORT please go to: **www.gcwcc-ccmtgc-national.org**.

Français
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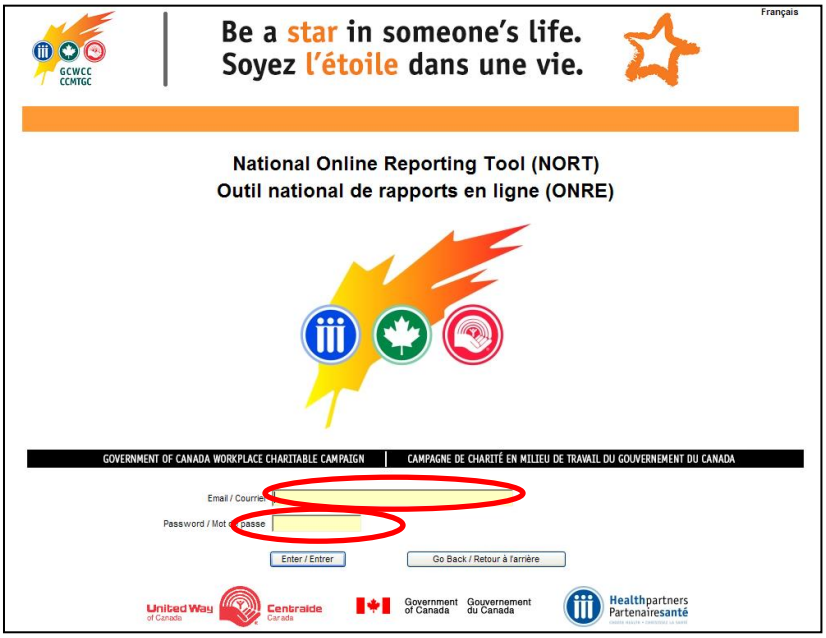
United Way / Centraide
Password / Mot de passe
Enter / Entrer
View Reports / Visualiser les rapports
Departmental Login / Nom d'utilisateur du ministère

To Log-in

Please click the **Departmental Login** option.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GOVERNMENT OF CANADA WORKPLACE CHARITABLE CAMPAIGN
CAMPAGNE DE CHARITÉ EN MILIEU DE TRAVAIL DU GOUVERNEMENT DU CANADA
Password / Mot de passe
Enter / Entrer
Go Back / Retour à l'arrière

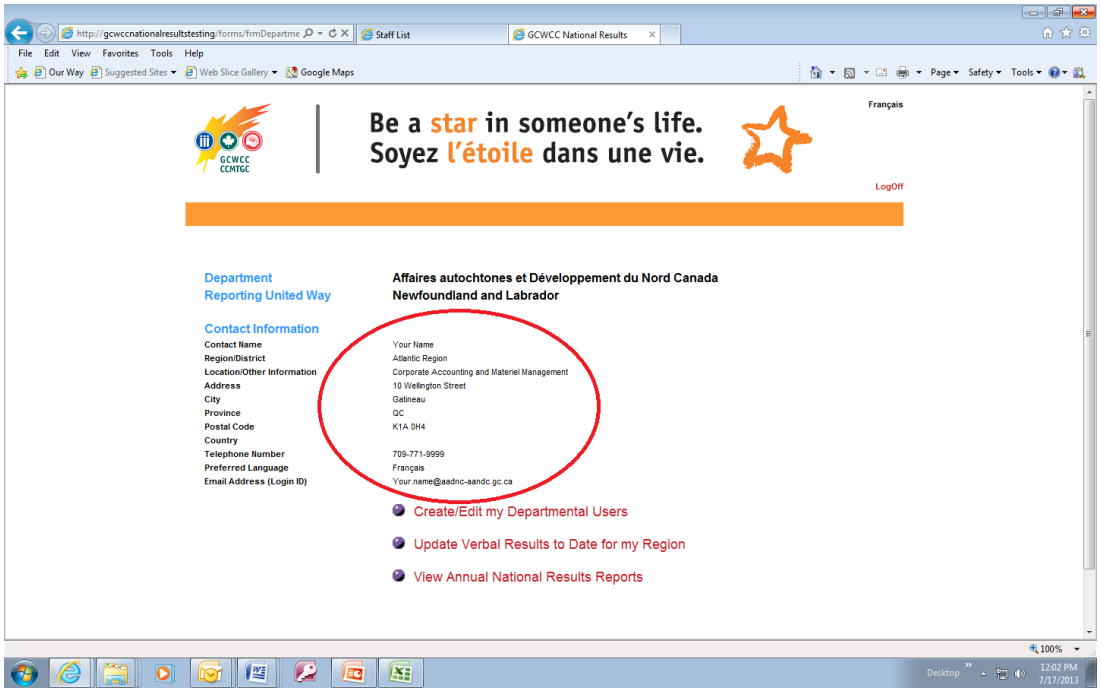
Please enter your **E-mail**.

Please enter your **Password**.

Note: Your password will be provided to you by the GCWCC National Office. If at any point in time you cannot remember your password, please contact Sandy Stiles at GCWCC_National@unitedwayottawa.ca or at (613) 228-6897.

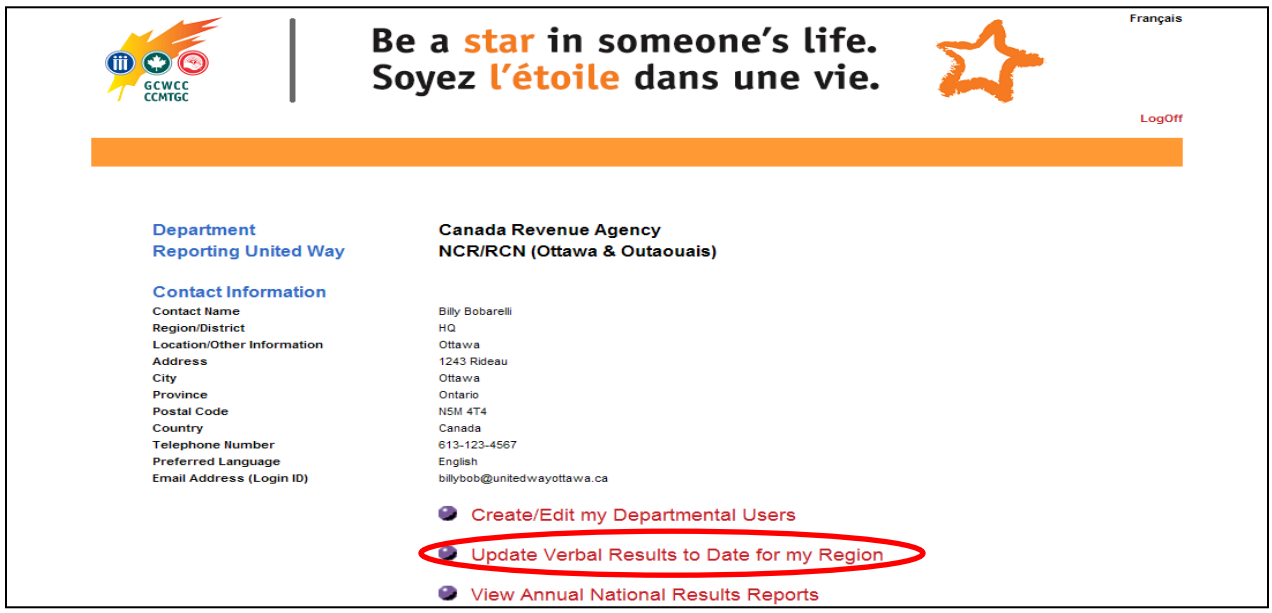
Main Menu

Upon log-in, you will be brought to the NORT **Main Menu**. Below is an example of the page you will see. The GCWCC National Office will pre-fill this page with your Departmental Administrator information before you receive your password. All you have to do is check the information and edit it if there are any errors.

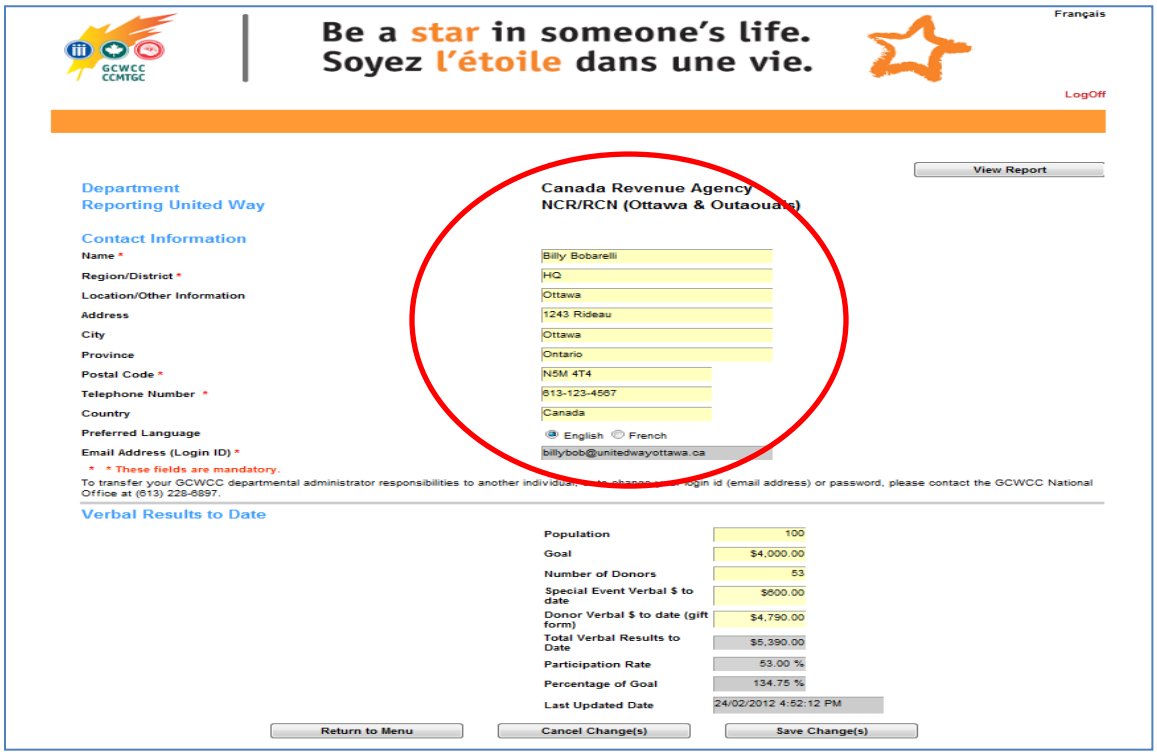


To Edit Contact Information

To edit your contact information, from the **Main Menu**, click Update Verbal Results to Date for my Region



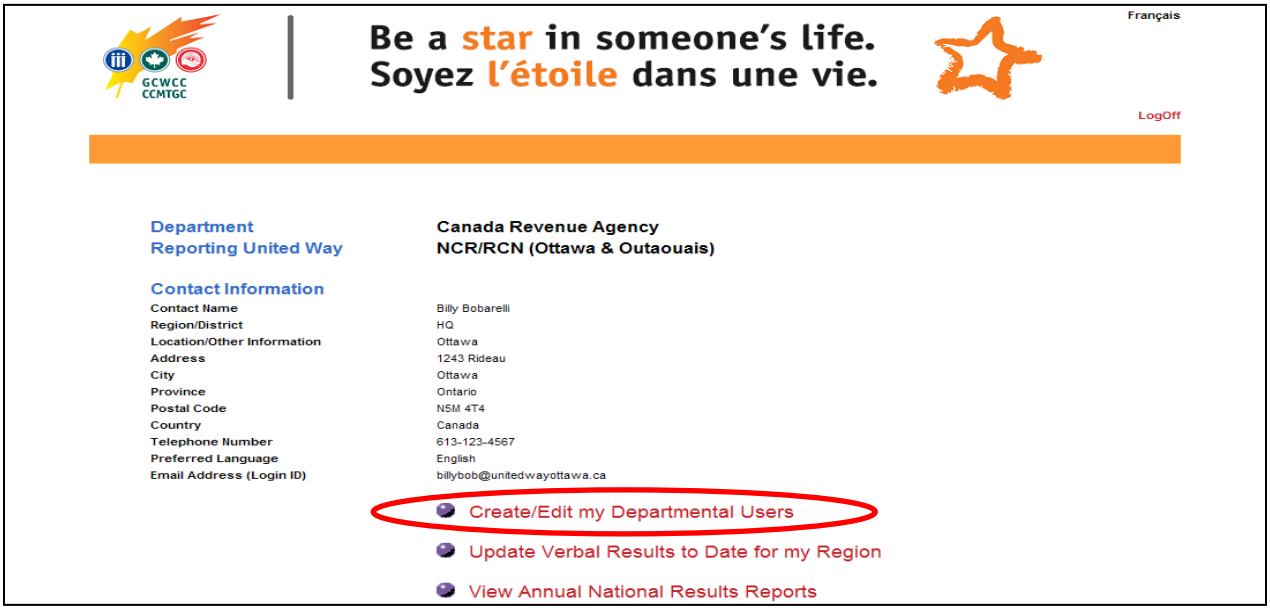
Now you can edit all of your Departmental Administrator contact information. Don't forget to click Save Change(s)!

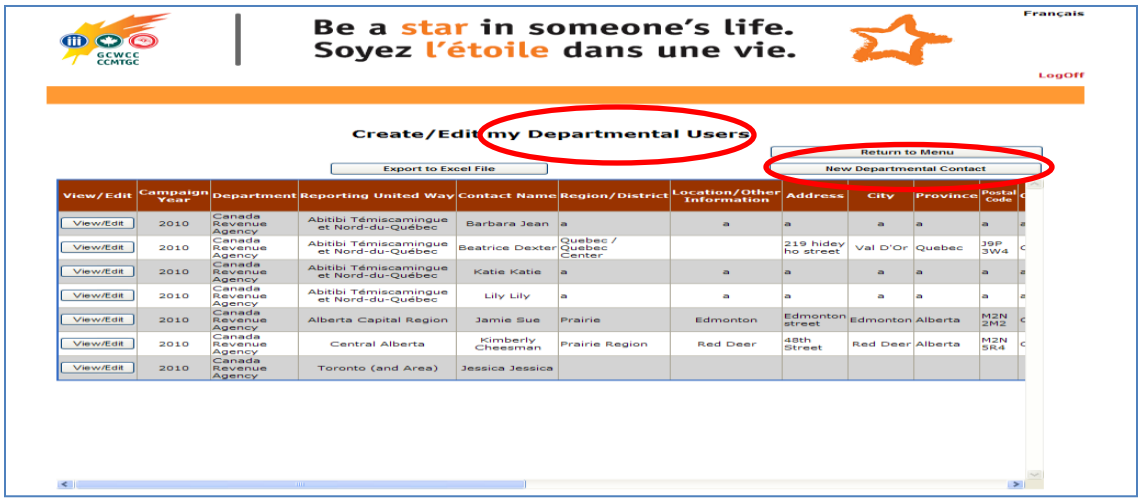


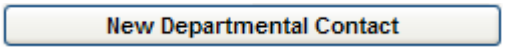
To create/edit a Departmental User

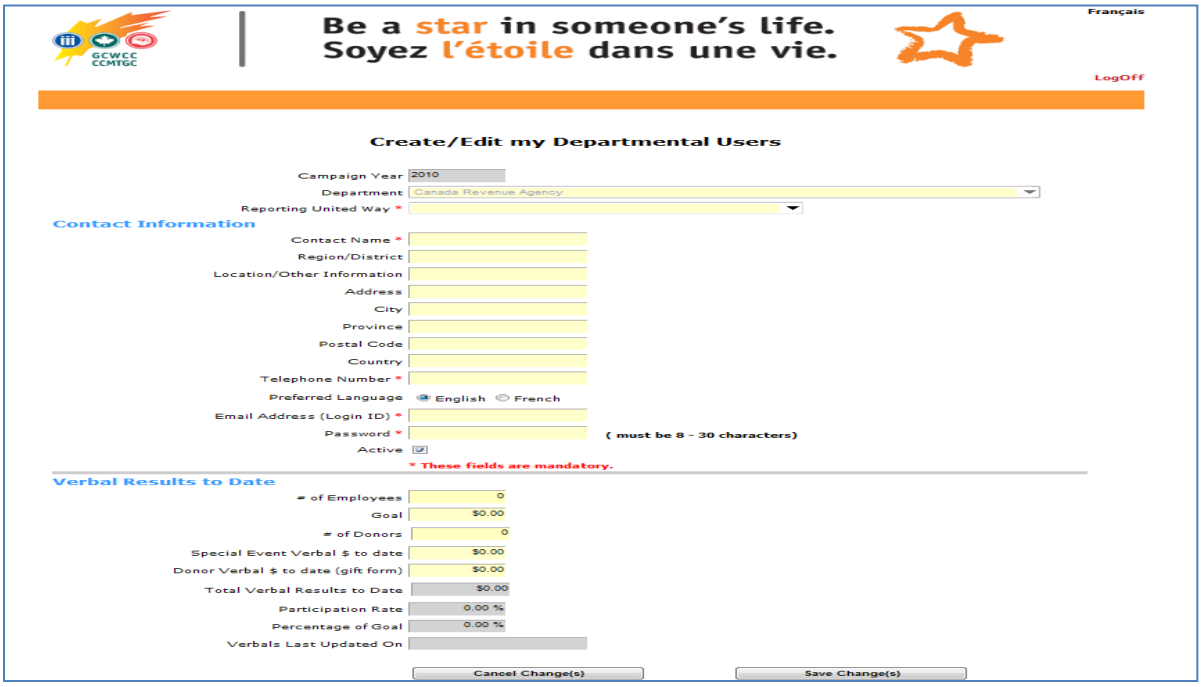
You will first need to identify the local volunteers in your department across Canada who are responsible for coordinating the GCWCC in their areas. Once you have done so, you can create Departmental User accounts for them in NORT.

From the **Main Menu** click Create/Edit my Departmental Users.





Click  , and a new screen will appear.



You can create as many Departmental User accounts as you need.

You will need to fill out 7 mandatory pieces of information for each Departmental User account that you create:

(1) Contact Name:

- The contact name is the name of the local volunteer (Departmental User) who you are opening the account for. Please provide a first and last name

(2) Region/District:

- Provide the name of the highest level of organization at whichyour campaign leader wants to report results.

(3) Location/Other Information:
- Provide the name of the next level of organization at which your campaign leader wants to report results.

(4) Telephone Number:
- Enter a telephone number for the Departmental User

(5) Email Address (Login ID)
- The email address of the Departmental User will be used as their Login ID.
- It is recommended that you use a workplace email address.

(6) Password
- You provide the password as the Departmental Administrator
- It is recommended that you use a simple series of numbers or letters
- It is also recommended that Departmental Administrator's keep a list of passwords somewhere safe
- If a password is ever misplaced or lost, the Departmental Administrator can reinstate a new password for the user, or you can contact the GCWCC National Office for assistance.

(7) Reporting United Way:
- Every User account that you create <u>MUST be linked to a reporting local United Way</u>. GCWCC campaigns are managed by local United Ways across the country, and these United Ways are where all gift forms are returned on a local basis for processing.

- <u>To find the local United Way for a particular User:</u>

    (i) Go to United Way Canada's website under the Local United Way Section: http://www.unitedway.ca/.
        - This site allows you to search for United Way by Postal Code
        - Enter the workplace postal code for the Departmental User and the local United Way will pop-up on screen. Enter the local United Way in NORT.

If you have any difficulties with any of these options, please contact the GCWCC National Office at (613) 228-6897.

Once you have opened the Departmental User account, and entered all of the required information, you will need to email the Departmental User and let them know:
1. Their login ID (email address)
2. Their password

To change a Departmental User for a region

Important Note: If there comes a time when you need to change a Departmental User for a particular location, **do NOT** delete the previous user. Every user account created carries a historical thread of data, which, if deleted, cannot be restored.

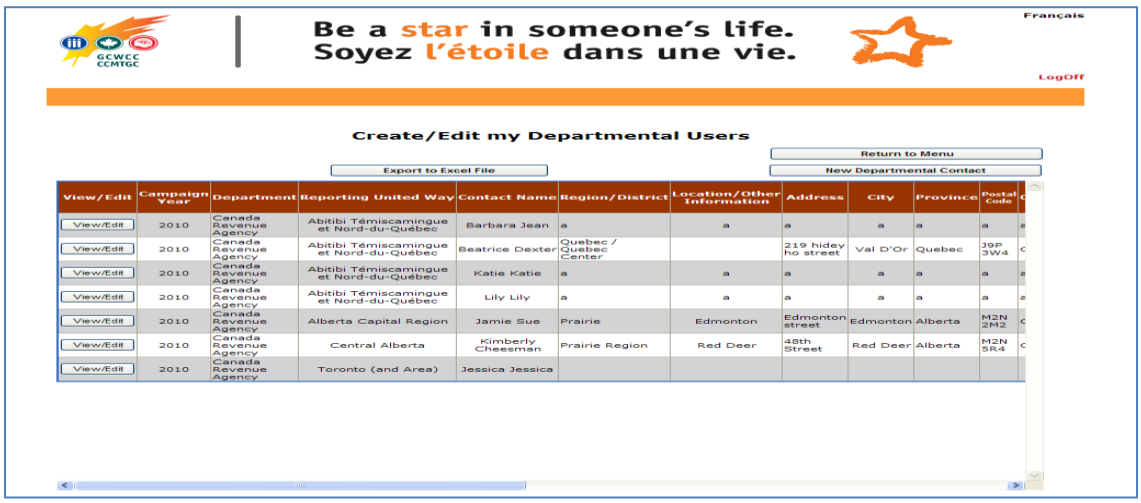
If it becomes necessary that you need to change a Departmental User for a specific location during the campaign, it would be necessary to identify another individual in that departmental office to assume the User role as quickly as possible. Once you have located a new Departmental User, there are two ways to transfer the responsibility:

Option 1 (preferred): Change the e-mail and password of the existing User to reflect the new User.

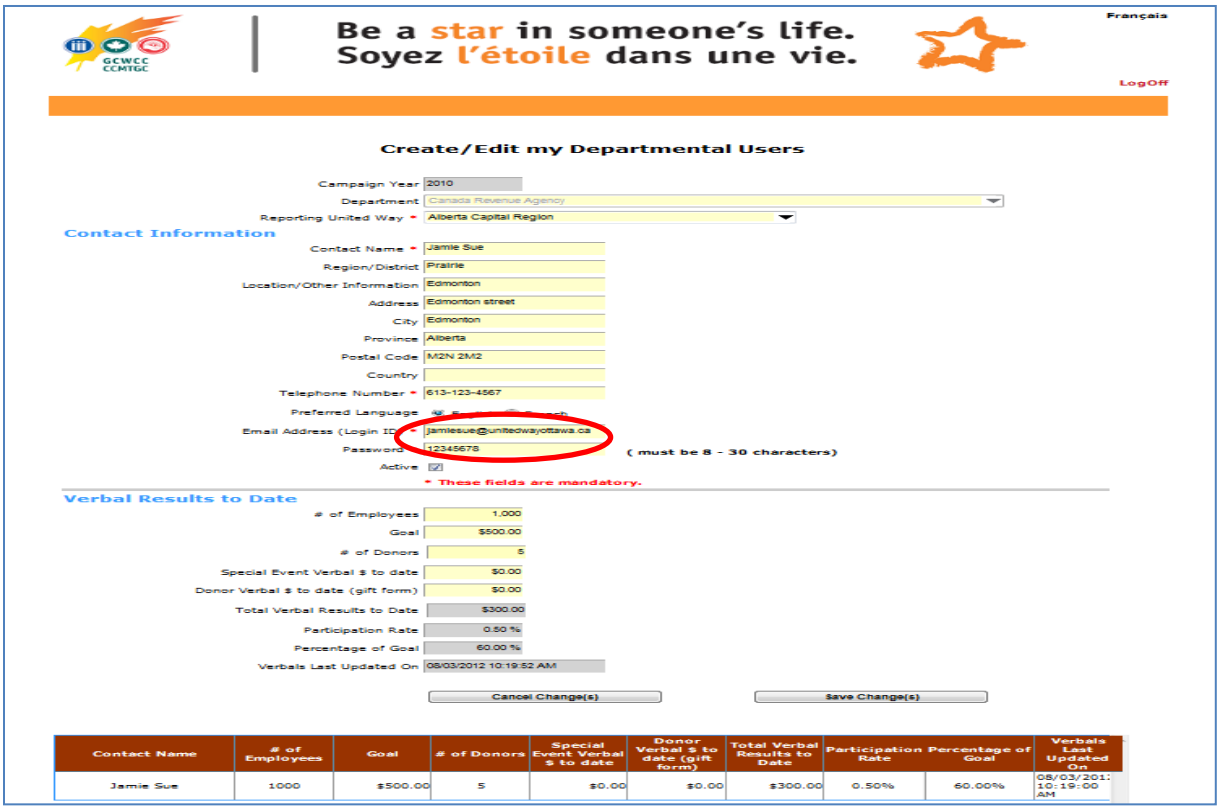
The simplest way to transfer the responsibility is to keep the account of the previous Departmental User and simply update the email, password and personal information to reflect the new User. By keeping the same account, this method will ensure that the previously entered data remains preserved.

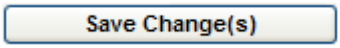
To pursue this option, from the Main Menu click Create/Edit my Departmental Users

You will be sent to a screen which will display any/all existing Departmental Users.



Click View/Edit on the line of the User that you want replace. A new page will appear with that user's information. When this appears, edit all of the information to reflect the details of the new User. Most importantly, do not forget to edit their **email address** and **password**.



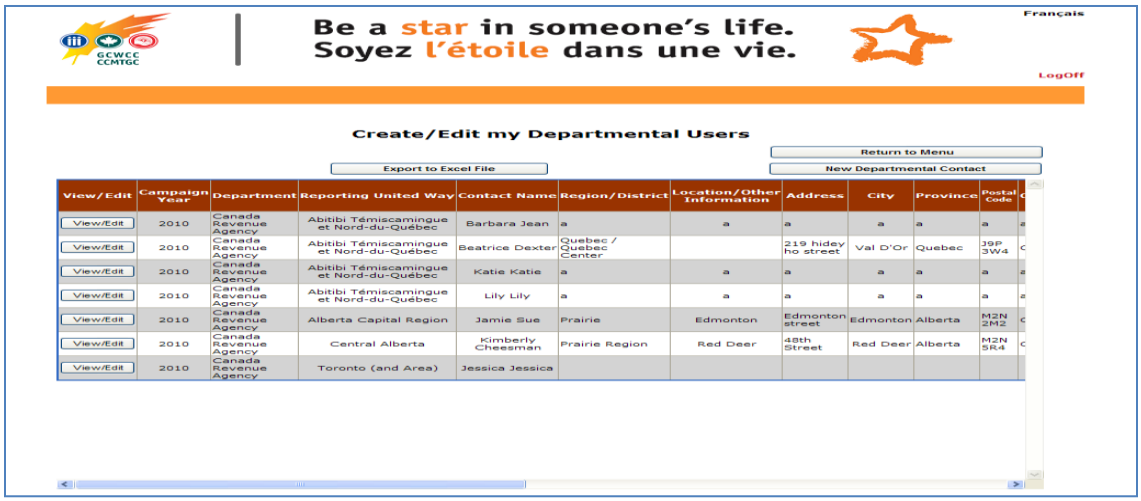
Remember to click  when you are finished making the changes!

Option 2: De-active the account of the previous User, and create a new account for the new User.

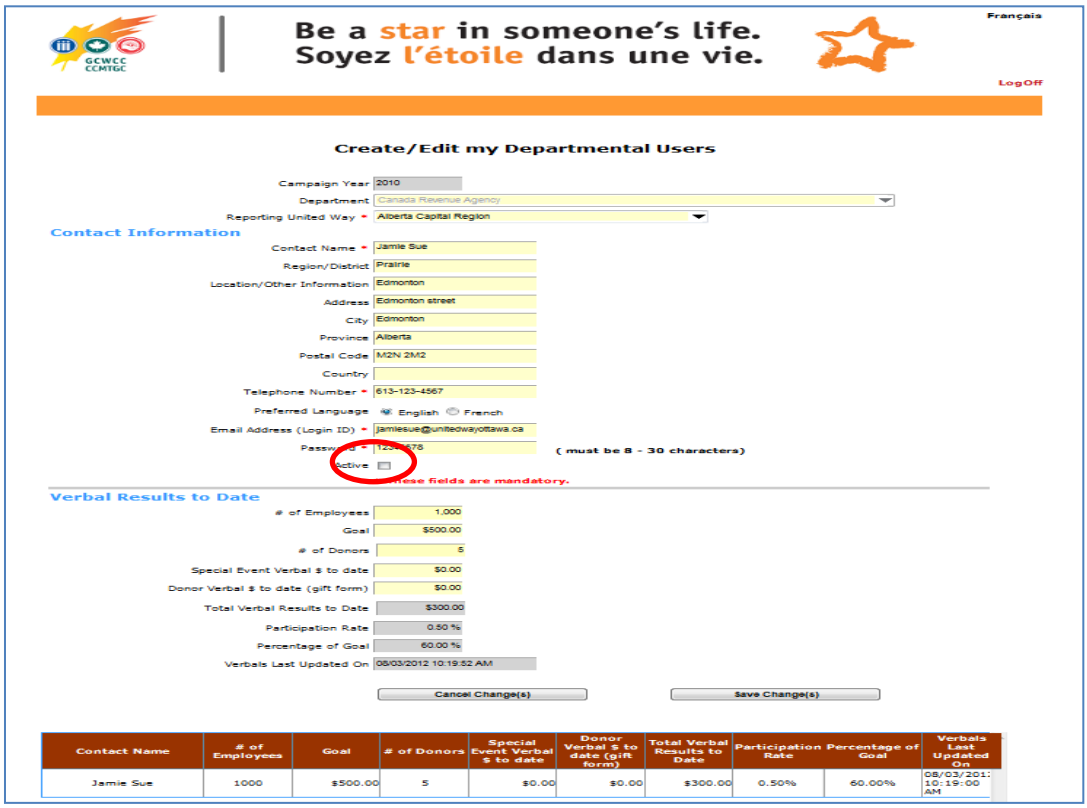
If there is a particular reason for which you would like to keep the accounts separate, you can de-active the account of the previous User and open a new account for the new User. To ensure previous data is preserved, the data entered by the deactivated User will continue to count toward the departmental verbal results in that particular location until the newly activated User enters data.

To de-activate a Departmental User, from the Main Menu click Create/Edit my Departmental Users

You will be sent to a screen which will display any/all existing Departmental Users.


Be a star in someone's life.
Soyez l'étoile dans une vie.
Français
LogOff
Create/Edit my Departmental Users
Export to Excel File
Return to Menu
New Departmental Contact
View/Edit | Campaign Year | Department | Reporting United Way | Contact Name | Region/District | Location/Other Information | Address | City | Province | Postal Code
View/Edit | 2010 | Canada Revenue Agency | Abitibi Témiscamingue et Nord-du-Québec | Barbara Jean | a | a | a | a | a | a
View/Edit | 2010 | Canada Revenue Agency | Abitibi Témiscamingue et Nord-du-Québec | Beatrice Dexter | Quebec / Quebec Center | | 219 hidey ho street | Val D'Or | Quebec | J9P 3W4
View/Edit | 2010 | Canada Revenue Agency | Abitibi Témiscamingue et Nord-du-Québec | Katie Katie | a | a | a | a | a | a
View/Edit | 2010 | Canada Revenue Agency | Abitibi Témiscamingue et Nord-du-Québec | Lily Lily | a | a | a | a | a | a
View/Edit | 2010 | Canada Revenue Agency | Alberta Capital Region | Jamie Sue | Prairie | Edmonton | Edmonton street | Edmonton | Alberta | M2N 2M2
View/Edit | 2010 | Canada Revenue Agency | Central Alberta | Kimberly Cheesman | Prairie Region | Red Deer | 48th Street | Red Deer | Alberta | M2N 5R4
View/Edit | 2010 | Canada Revenue Agency | Toronto (and Area) | Jessica Jessica

Click View/Edit on the line of the User that you want <u>to de-activate</u>. A new page will appear with that user's information. When this happens, unclick the **<u>active status</u>** button: (see below).


Be a star in someone's life.
Soyez l'étoile dans une vie.
Français
LogOff
Create/Edit my Departmental Users
Campaign Year 2010
Department Canada Revenue Agency
Reporting United Way * Alberta Capital Region
Contact Information
Contact Name * Jamie Sue
Region/District Prairie
Location/Other Information Edmonton
Address Edmonton street
City Edmonton
Province Alberta
Postal Code M2N 2M2
Country
Telephone Number * 613-123-4567
Preferred Language English French
Email Address (Login ID) * jamiesue@unitedwayottawa.ca
(must be 8 - 30 characters)
Active
* These fields are mandatory.
Verbal Results to Date
# of Employees 1,000
Goal $500.00
# of Donors 5
Special Event Verbal $ to date $0.00
Donor Verbal $ to date (gift form) $0.00
Total Verbal Results to Date $300.00
Participation Rate 0.50 %
Percentage of Goal 60.00 %
Verbals Last Updated On 08/03/2012 10:19:52 AM
Cancel Change(s)
Save Change(s)
Contact Name | # of Employees | Goal | # of Donors | Special Event Verbal $ to date | Donor Verbal $ to date (gift form) | Total Verbal Results to Date | Participation Rate | Percentage of Goal | Verbals Last Updated On
Jamie Sue | 1000 | $500.00 | 5 | $0.00 | $0.00 | $300.00 | 0.50% | 60.00% | 08/03/2012 10:19:00 AM

You can now create a new User. See instructions above (*To create/edit a Departmental User*)

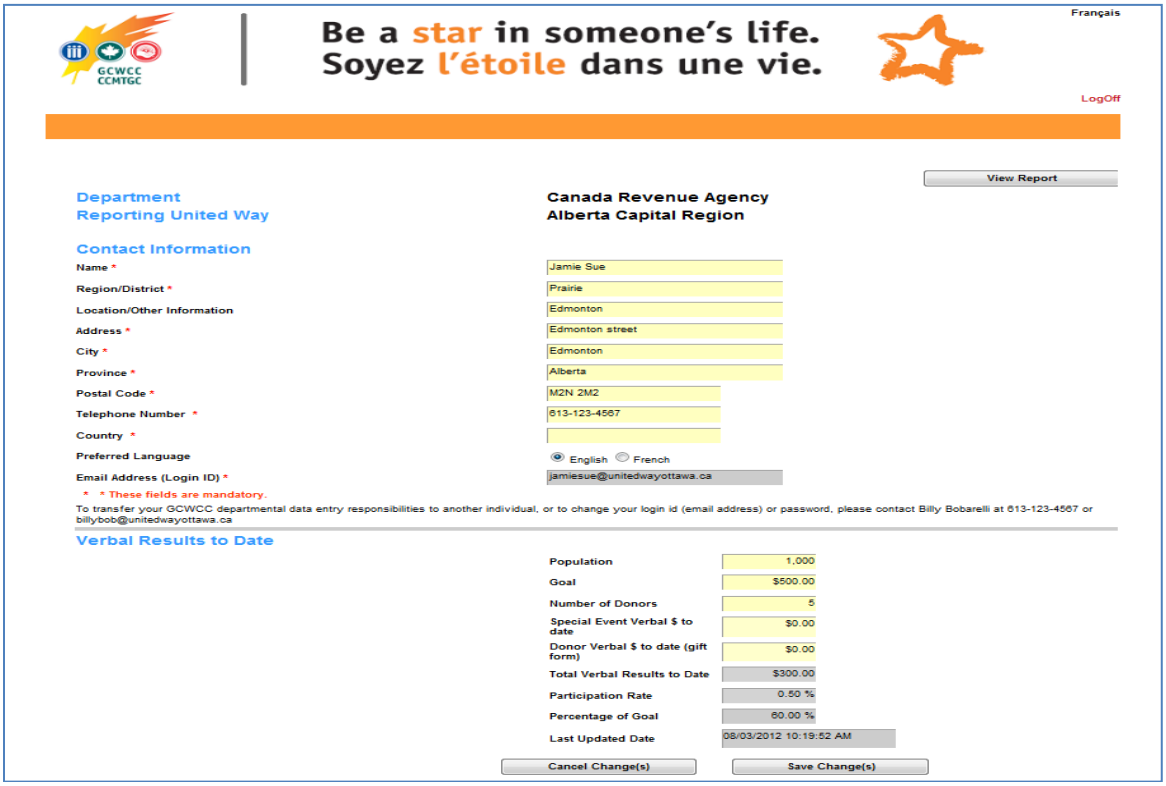
Updating a location's GCWCC Verbal Results to Date

NOTE – There is a Departmental User's manual available for each Departmental User to help guide them through the following process.

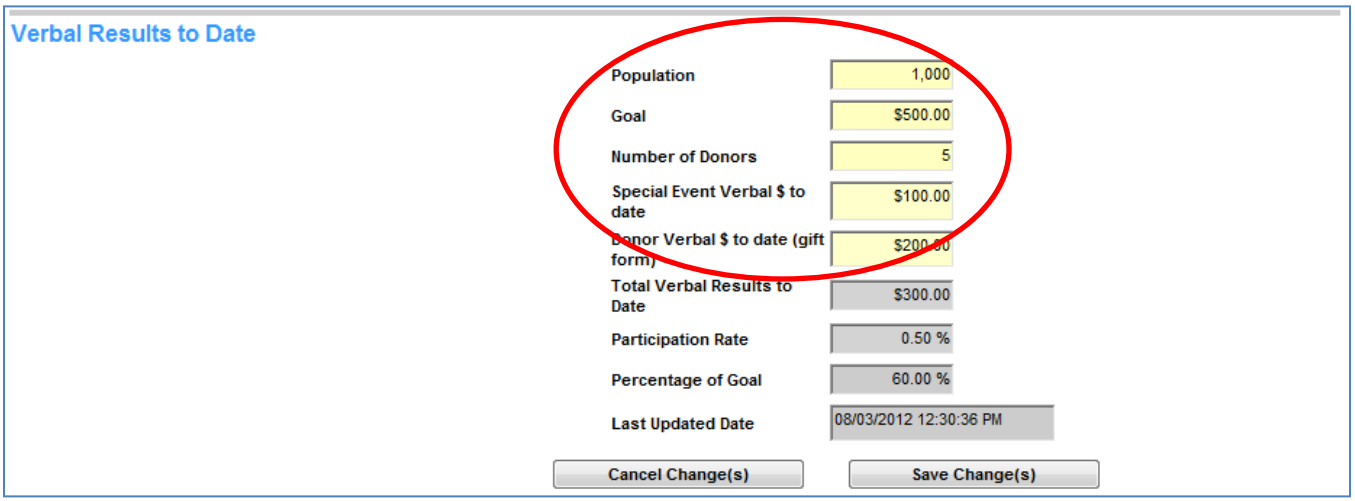
You will need to make sure that all of your Departmental Users enter updated information in NORT every week of the GCWCC from late September to early December.

The deadline for submissions will be 12:00 p.m. Eastern Standard Time every Monday. You may wish to ask your Departmental Users to submit their data a bit earlier so you can have a look at it also. The data that is in NORT by 4:00 p.m. E.S.T. every Monday is what will be used to prepare the reports for the weekly Deputy Ministers' breakfast meetings on Wednesday.

When Departmental Users log in, they go directly to their only screen – which allows them to update their own contact information, and to enter their verbal results.

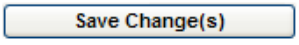


Below their contact information, they will find the following section to fill out to update their GCWCC verbal campaign results.



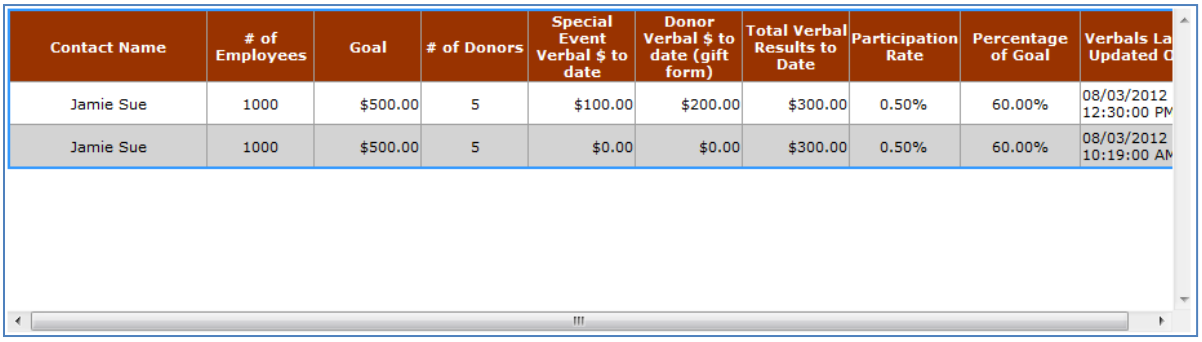
They will be asked to update the following five items for their local departmental office(s) with GCWCC information:

- Population;
- Goal;
- Number of donors (those who have filled out a gift form);
- Special Events Verbal dollars to date (verbal donations via special events); and
- Donor Verbal dollars to date (verbal donations via the gift form).

Departmental Users should be reminded not to forget to click 

when they are finished entering your data.

Once "Save Changes" has been clicked, the data is kept in a historical record which is displayed below the data entry section.



Contact Name	# of Employees	Goal	# of Donors	Special Event Verbal $ to date	Donor Verbal $ to date (gift form)	Total Verbal Results to Date	Participation Rate	Percentage of Goal	Verbals La Updated C
Jamie Sue	1000	$500.00	5	$100.00	$200.00	$300.00	0.50%	60.00%	08/03/2012 12:30:00 PM
Jamie Sue	1000	$500.00	5	$0.00	$0.00	$300.00	0.50%	60.00%	08/03/2012 10:19:00 AM

To View Current Year's Verbal Results Reports or Final Results Reports from a Previous Year

Notes:

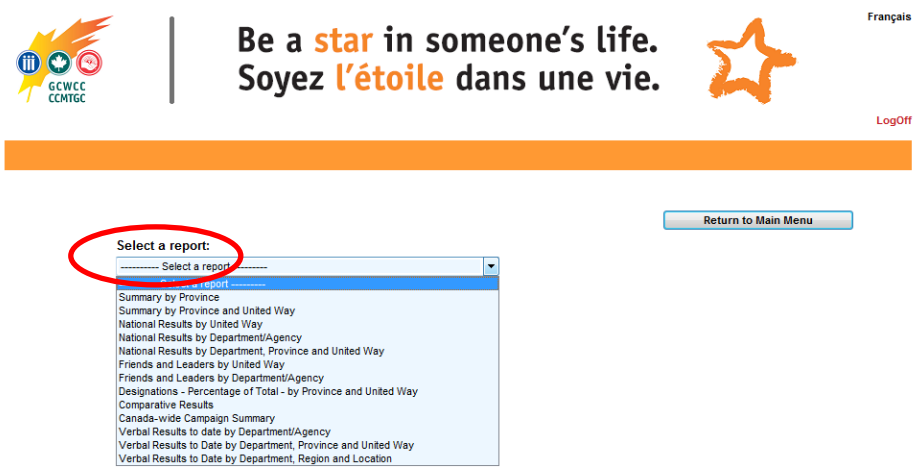
- When viewing verbal reports, only the current year's reports are available for your respective department. You will not be able to see data on other departments.
    - Verbal Result to date by Department/Agency
    - Verbal Result to date by Department, Province and United Way
    - Verbal Results to date by Department, Region and Location

- The final results for the current year will not be available until all results are in and they have been released from the GCWCC National Office. However, you will be able to view final results from previous years.
    - Summary by Province
    - Summary by Province and United Way
    - National Results by United Way
    - National Results by Department/Agency
    - National Results by Department, Province and United Way
    - Friends and Leaders by United Way
    - Friends and Leaders by Department/Agency
    - Designations – Percentage of Total – by Province and United Way
    - Comparative Results

From the **Main Menu** click View Annual National Results Reports .

A list of all national results reports available for viewing will appear.

Select the report you would like to view.


Be a star in someone's life.
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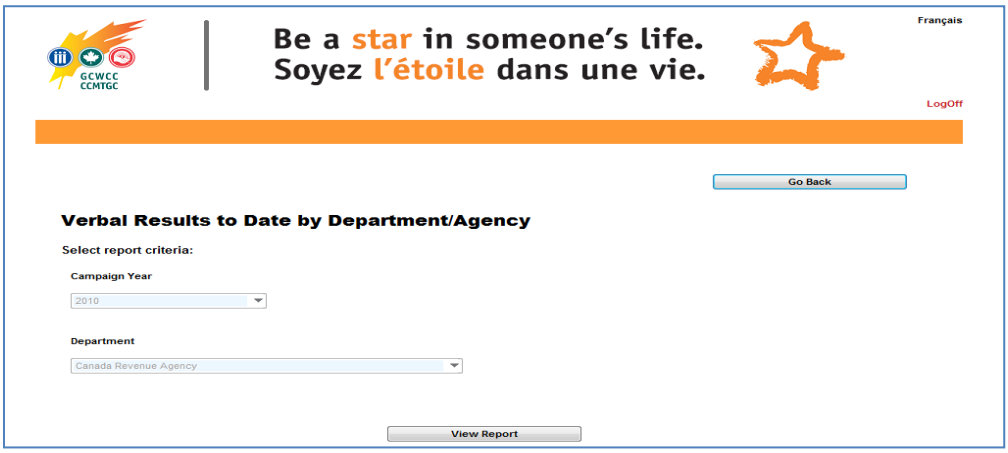
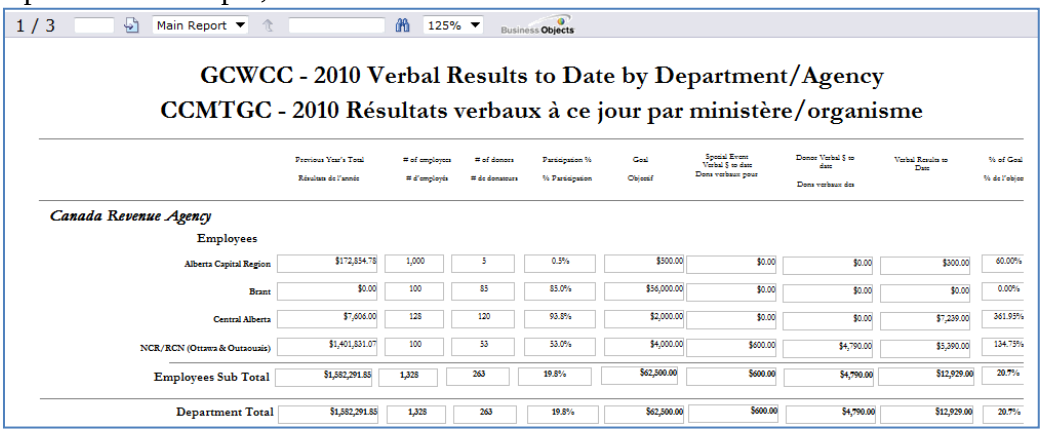
Français
LogOff
Return to Main Menu
Select a report:
--------- Select a report ---------
Summary by Province
Summary by Province and United Way
National Results by United Way
National Results by Department/Agency
National Results by Department, Province and United Way
Friends and Leaders by United Way
Friends and Leaders by Department/Agency
Designations - Percentage of Total - by Province and United Way
Comparative Results
Canada-wide Campaign Summary
Verbal Results to date by Department/Agency
Verbal Results to Date by Department, Province and United Way
Verbal Results to Date by Department, Region and Location

Depending on the report that you chose, you will be prompted to select additional criteria. For example, you will be prompted to select the year or department that you would like to view. However, if you select any of the Verbal Results to date reports, you will only have access to the verbal results for your particular department for the current campaign year.

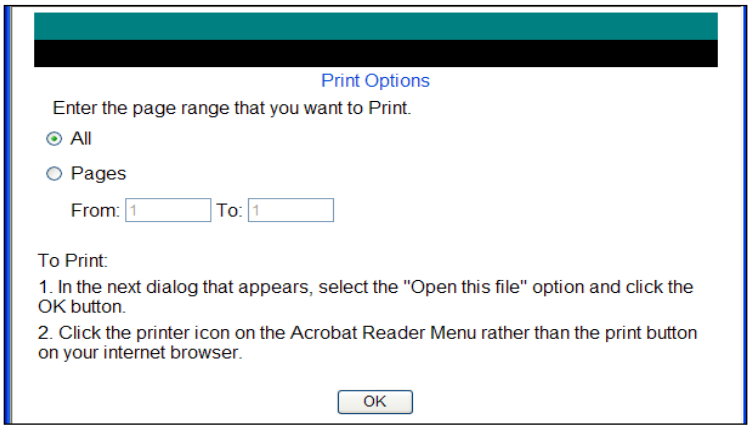


Once you have made all of your selections, click View Report. You will then be able to view the report. For example, see below:

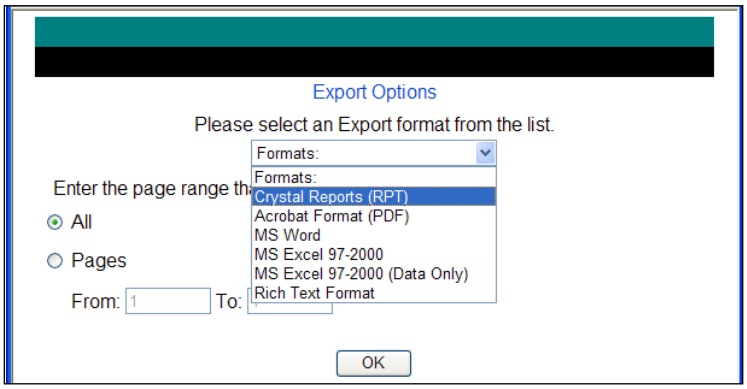


Options for National Reports

A) Print the report by selecting in the top left hand corner. The following screen will appear. Select the portion of the report you would like to print (or the entire thing) and then follow your normal printing dialogue instructions.


Print Options
Enter the page range that you want to Print.
All
Pages
From: 1 To: 1
To Print:
1. In the next dialog that appears, select the "Open this file" option and click the OK button.
2. Click the printer icon on the Acrobat Reader Menu rather than the print button on your internet browser.
OK

B) Save the report by selecting in the top left hand corner. The following screen will appear Select the format that you would like to save the report in. Then select the portion of the report you would like to save (by page number) or you may save the entire document and Click



Thank You!

Thank you for participating in our pilot project for GCWCC departmental verbal results reporting.

Please contact the GCWCC National Office if you need any assistance.

If you are contacted by Departmental Users who have questions that you cannot answer, please have them call us, or their local United Way for further assistance.

We would also appreciate to hear feedback from you on your pilot experience. Please feel free to email the National Office